



# Rail Scotland Conference

March 2024

# Transport Focus – who we are

## The voice of Britain's transport users

As the voice of Britain's transport users we:

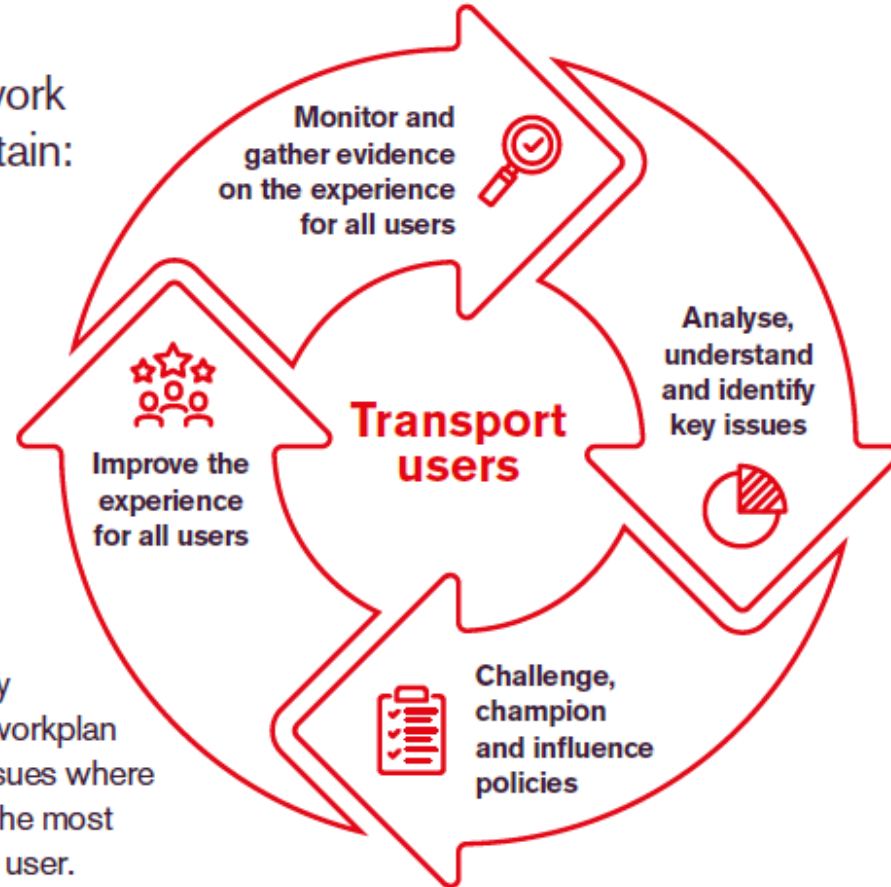
Champion the needs of all transport users **today**.

Ensure that all transport users are at the centre of policy making and decisions for **tomorrow**.

Facilitate and inspire **future** transport thinking.

How we work across Britain:

We will make a difference by ensuring our workplan reflects the issues where we can have the most impact for the user.

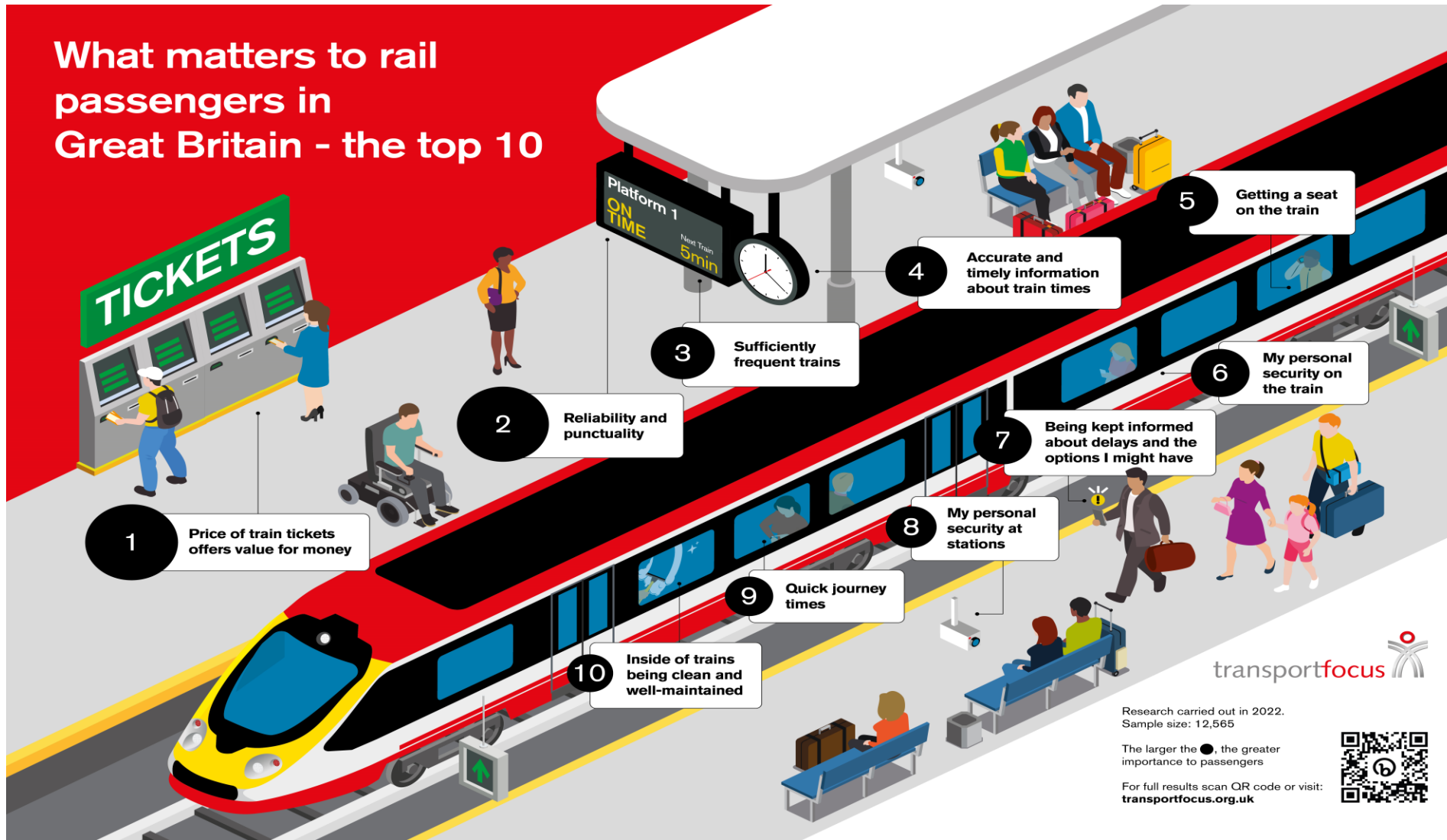


# Top ten transport user priorities

	Rail passengers	Bus passengers	Road users	
1	Price of train tickets offers value for money	Buses running more often	Improved quality of road surfaces	1
2	Reliability and punctuality	Buses going to more places	Safer design and upkeep of roads	2
3	Sufficiently frequent trains	More buses on time at stop	Better management of road works	3
4	Accurate and timely information about train times	Better value for money	Better management of unplanned delays such as accidents or breakdowns	4
5	Getting a seat on the train	More bus journeys on time	Better information about unplanned disruption (eg accidents)	5
6	My personal security on the train	More effort to tackle anti-social behaviour	Better behaved drivers	6
7	Being kept informed about delays and the options I might have	Faster journey times	Better information about roadworks happening in future	7
8	My personal security at stations	More bus stops with next bus displays	Better lighting on the network	8
9	Quick journey times	Better quality information at bus stops	Reduced environmental impact of road travel	9
10	Inside of trains being well maintained	More space for wheelchairs and buggies	Better roadside facilities (service areas, laybys)	10
	<a href="#">Britain's railway: what matters to passengers - Transport Focus</a>	<a href="#">Bus passengers' priorities for improvement - Transport Focus</a>	<a href="#">Road users' priorities for improvement - Transport Focus</a>	

# Rail – passenger priorities

What matters to rail passengers in Great Britain - the top 10



transportfocus 

Research carried out in 2022.  
Sample size: 12,565

The larger the ●, the greater importance to passengers

For full results scan QR code or visit:  
[transportfocus.org.uk](https://transportfocus.org.uk)



# Summary of satisfaction by train company

	Overall satisfaction	Punctuality / reliability	Frequency of trains on route	Level of crowding	Cleanliness	Information during journey	Value for money
Avanti West Coast	85	69	71	71	81	76	59
c2c	91	83	77	78	78	80	52
Chiltern Railways	84	86	79	76	86	78	65
CrossCountry	75	72	63	60	74	69	62
East Midlands Railway	83	79	73	69	78	77	55
Great Northern	92	82	70	80	77	85	59
Great Western Railway	84	74	76	71	83	76	57
Greater Anglia	88	87	75	76	90	82	50
London North Eastern Railway	88	81	79	73	82	84	69
London Northwestern Railway	80	76	73	65	67	72	63
London Overground	92	84	80	78	84	85	73
Merseyrail	91	88	90	84	84	84	72
Northern	84	70	67	73	79	77	63
ScotRail	89	83	75	82	80	80	64
South Western Railway	84	76	68	69	74	77	48
Southeastern	87	81	70	74	79	81	53
Southern	80	73	68	71	71	74	47
Elizabeth Line	91	82	83	76	86	85	66
Thameslink	88	75	67	73	80	76	50
TransPennine Express	78	70	58	62	74	71	59
Transport for Wales	74	63	62	64	75	74	52
West Midlands Railway	85	75	74	74	76	72	61

Score relatively high compared with other TOCS

Score relatively average compared with other TOCS

Score relatively low compared with other TOCS

# Overall journey satisfaction by train company

Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024

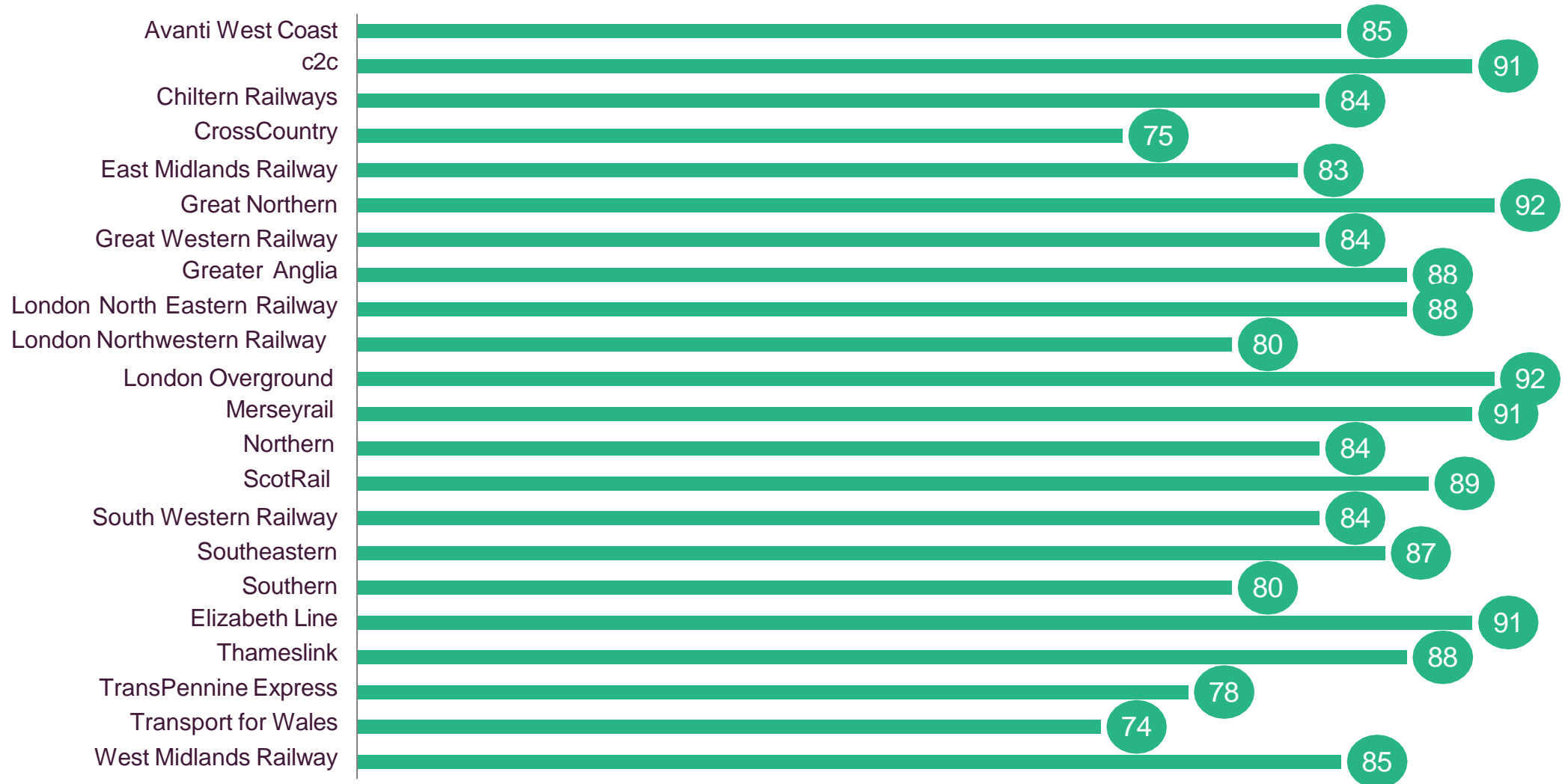


Chart axes range from 40% to 100% to better show the differences in values between train operating companies.

Base sizes shown in appendix

# ScotRail

## Satisfaction by 12-wave time periods

### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022

12 Jan - 3 Apr 2022

8 Apr - 26 June 2022

1 July - 18 Sept 2022

23 Sept - 11 Dec 2022

16 Dec 2022 - 19 Mar 2023

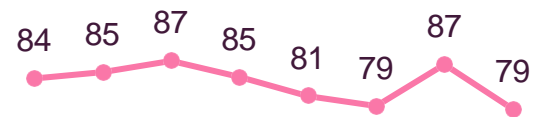
26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024

### Overall satisfaction



### Punctuality / reliability



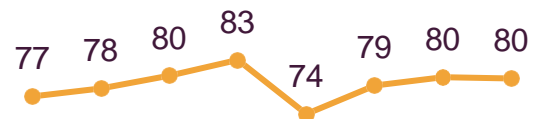
### Value for money



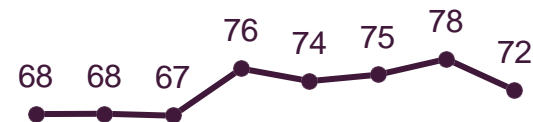
### Level of crowding



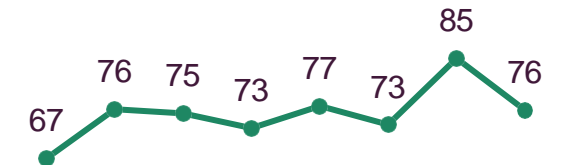
### Cleanliness



### Frequency of services



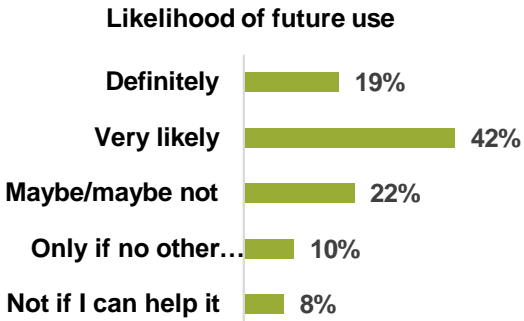
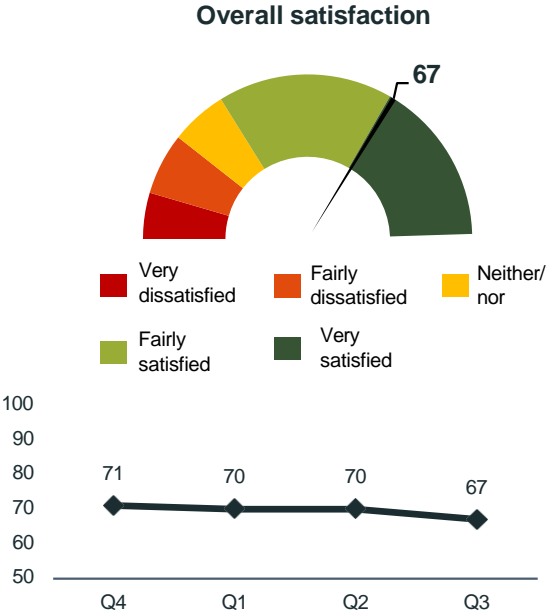
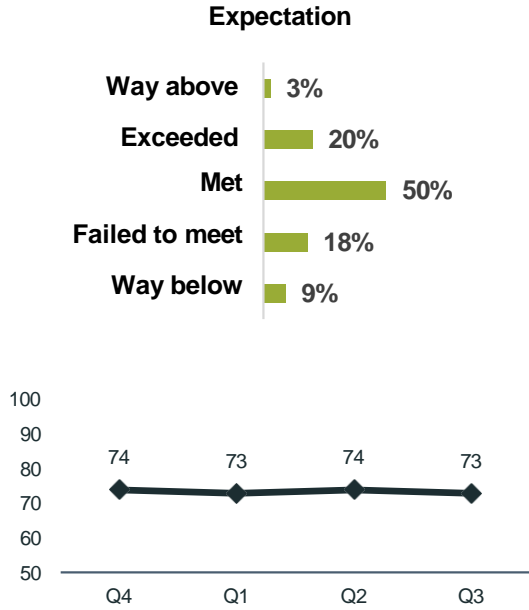
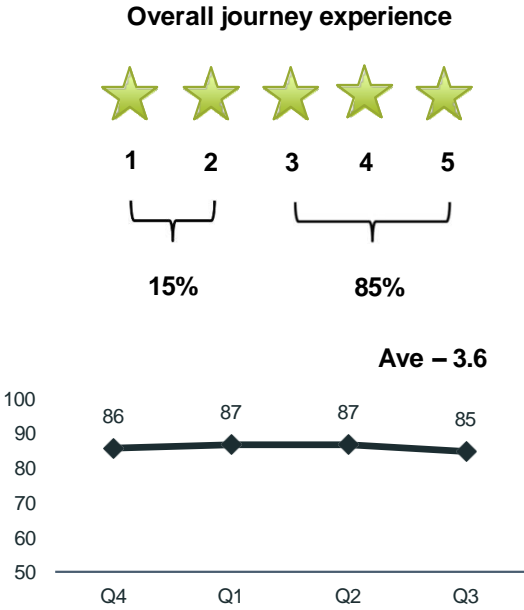
### Information during journey



Sample sizes: ScotRail: overall satisfaction 330, 286, 163, 191, 190, 200, 224, and 234; punctuality/reliability 329, 285, 162, 191, 189, 199, 224, and 232; value for money 330, 282, 160, 191, 189, 198, 224, and 233; level of crowding 324, 278, 161, 191, 189, 199, 224, and 230; cleanliness 330, 286, 162, 191, 190, 199, 224, and 233; frequency of services 328, 285, 163, 191, 189, 197, 224, and 234; information during journey 301, 262, 151, 178, 177, 183, 209, and 222.

# Caledonian Sleeper Passenger Satisfaction

Quarter 3: 17 September – 9 December 2023



	Lowlander	Highlander
Journey experience	87%	83%
et / Above expectation	73%	73%
Overall satisfaction	66%	68%
Net Promoter Score	3%	16%
Future Use	58%	63%

Sample size: 601 (Lowlander 279, Highlander 322)

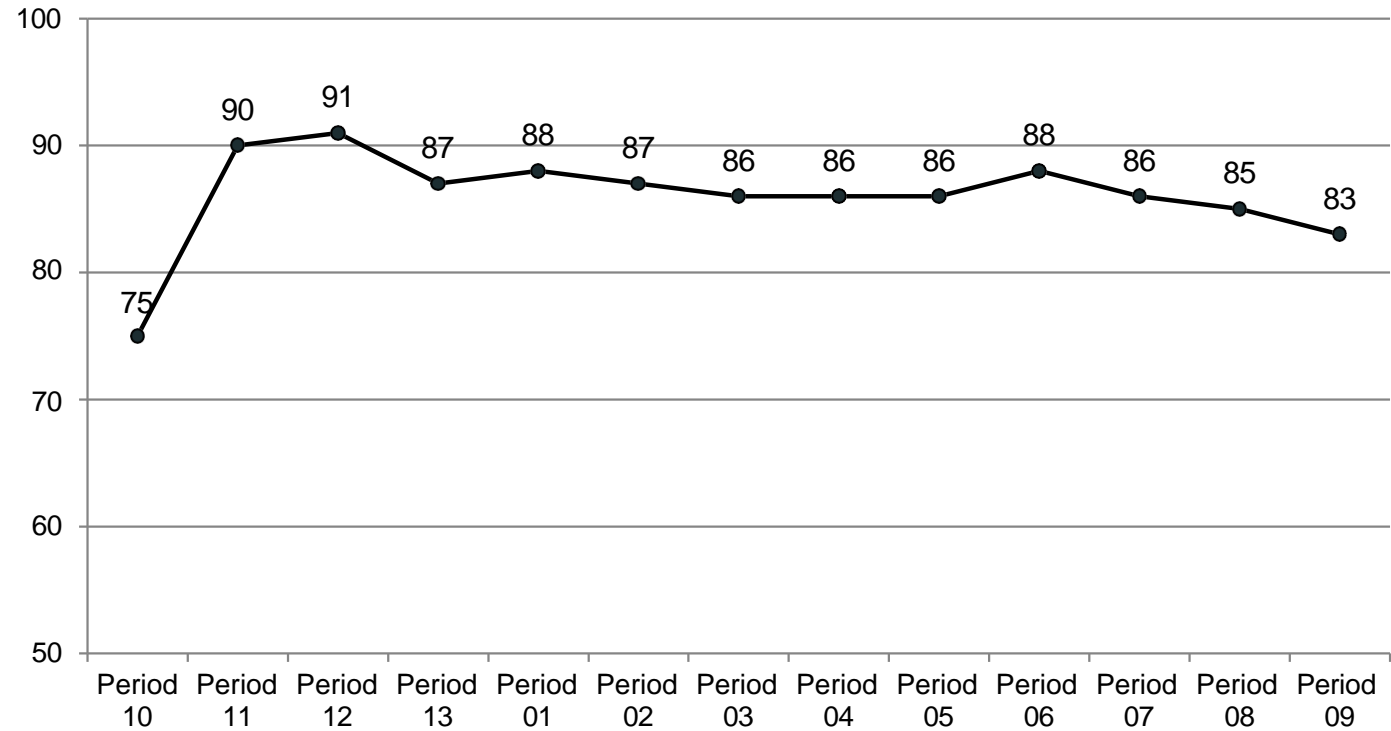




# Overall rating of experience – trend

Rating of experience

Trend: % Three, four or five stars

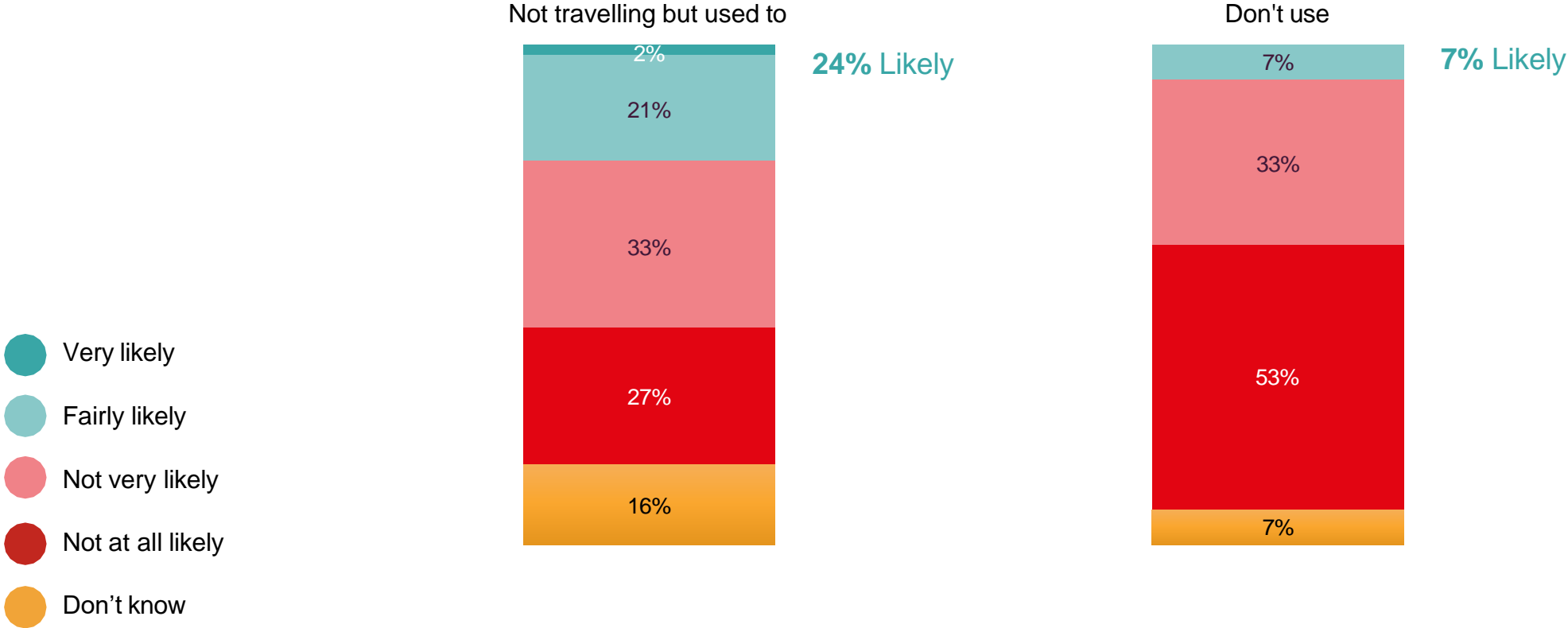


Q11a. How many stars do you give the Caledonian Sleeper for the experience overall?



# Around a quarter of lapsed train users are likely to consider using the train again

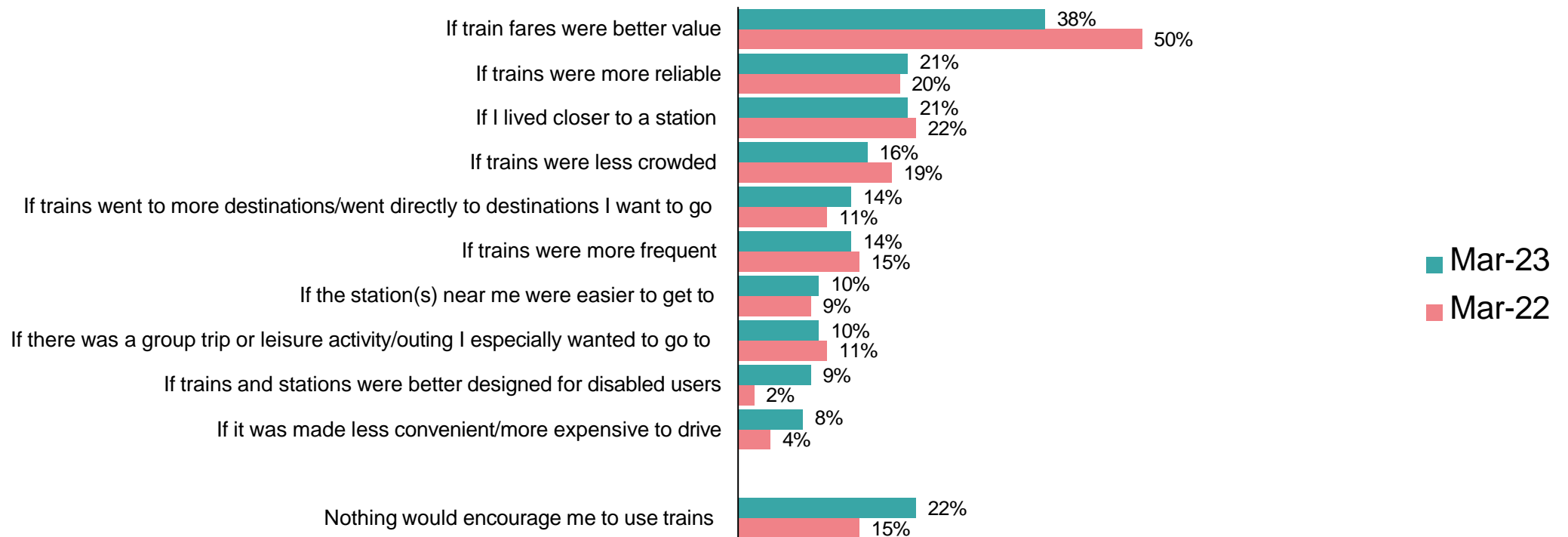
How likely is it that you will use trains in the future?



Base: Those who are not currently using trains, but used to (199) and those who do not use trains (278).

# Better value fares, reliability, and closer proximity to a station would encourage lapsed users to use the train once again

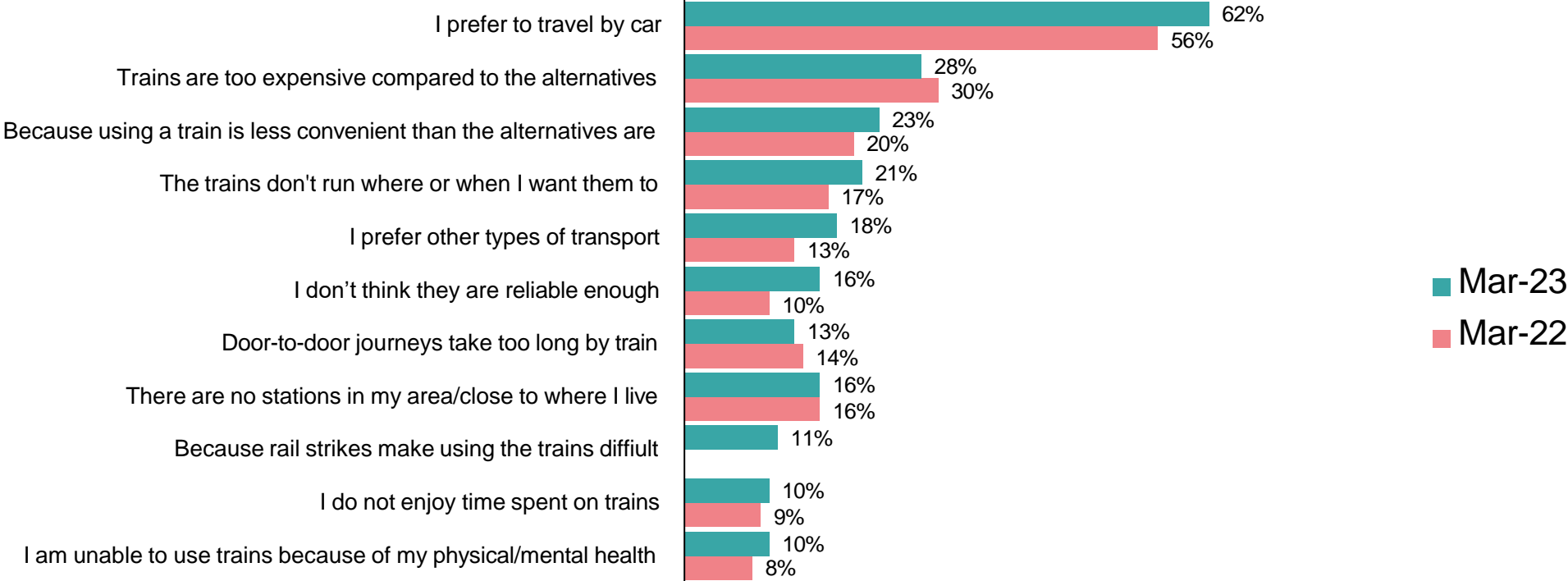
Which five of the following would encourage you to use your local train service once again? (Top 9 reasons shown )



Base: All those who do not use trains, but used to (2022 = 334) (2023=150).

# The majority of non-users don't use the train because they prefer to travel by car. Cost is also a factor

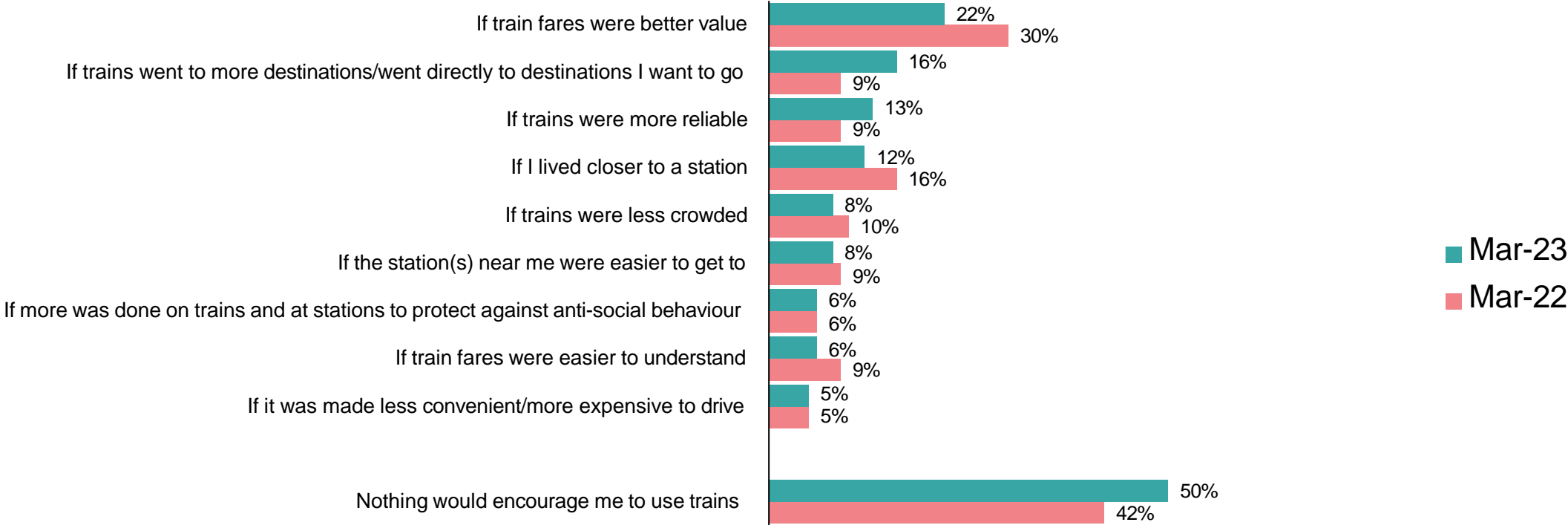
Which of the following reasons best describes why you do not use trains? (Top 12)



Base: All those who do not use trains (2022 = 628) (2023=279).

# Better value fares would be the biggest driver for non-users to use the train

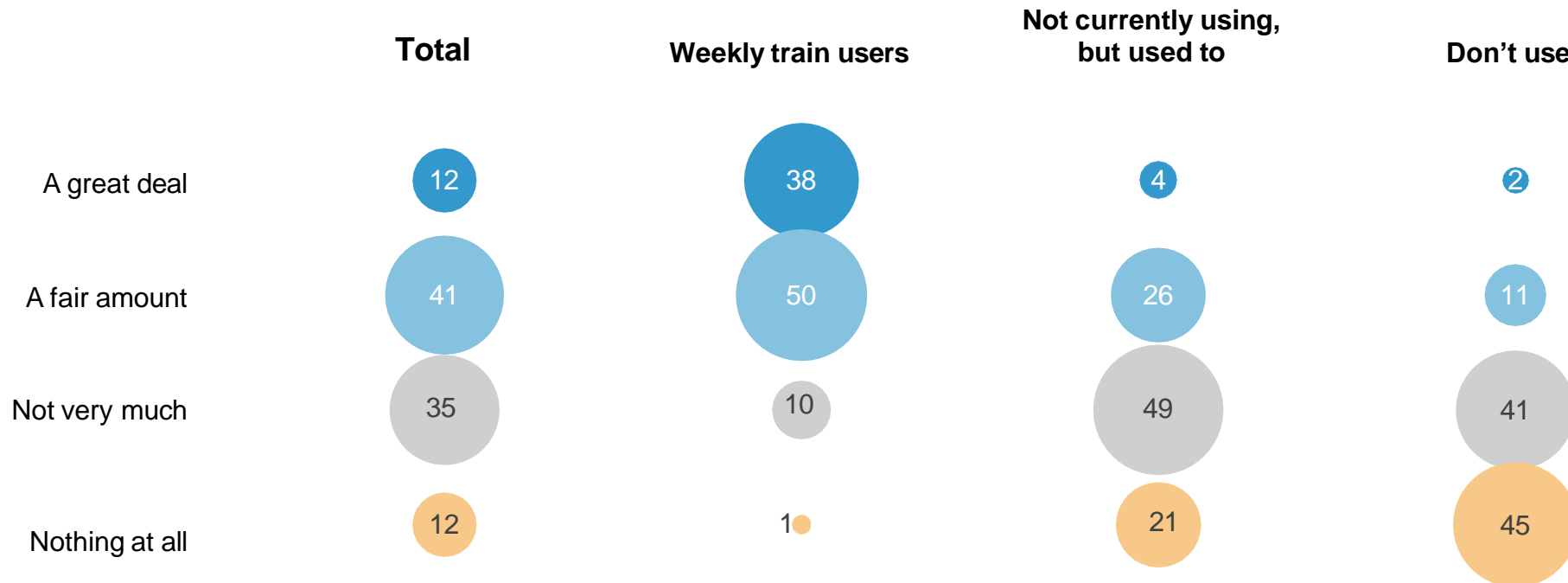
Which five of the following would encourage you to use your local train service? (Top 12)



Base: All those who do not use trains (2022 = 618) (2023=279).

# The majority of non users have significant gaps in their knowledge about train services

How much overall would you say you know about your local train service?



Base: All respondents (2006) Weekly train users (290) Not currently using but used to (199) Don't use (279).